

DID YOU KNOW?
EMPLOYEES ARE INTERESTED IN HAVING
THEIR EMPLOYERS PROVIDE FINANCIAL ADVICE,
GUIDANCE AND RETIREMENT EDUCATION*

WE'VE GOT YOU COVERED!



STRATEGY 
financial group

RETIREMENT WEALTH ADVISORS



WE OFFER A SERIES OF FINANCIAL AND RETIREMENT WORKSHOPS FOR CORPORATE EMPLOYEES

1-HOUR WORKSHOPS ARE PRESENTED ON-SITE BY A LICENSED FINANCIAL ADVISER AND FIDUCIARY AT NO COST TO YOUR COMPANY

TOPICS INCLUDE:

UNDERSTANDING SOCIAL SECURITY

- When to begin your Social Security benefits, and the \$1,000,000 question
- Why the Social Security office can't recommend the best option for maximizing your lifetime benefit
- What factors to consider before you apply for benefits, and how to determine the best choice for your situation
- How to coordinate Social Security with your other sources of retirement income
- How you may increase survivorship benefits by up to 66%
- How you might increase your lifelong benefits by tens of thousands of dollars

TAX PLANNING FOR A FINANCIALLY SECURE RETIREMENT

- How could taxes affect your retirement income
- How might taxes affect your Social Security
- How could taxes affect the surviving spouse

UNDERSTANDING YOUR OPTIONS WITH MEDICARE

- When are you required to apply for Medicare and associated costs?
- Medicare Part A and Part B
- Penalties for late enrollment
- Medicare Plans, Supplement, Advantage Plus, Part D Plans

THE THREE MOST COMMON ESTATE PLANNING MISTAKES TO AVOID

- What is an Estate Plan and who needs one?
- What are the key differences between Wills and Trusts?
- The three most common mistakes people make with Estate Plans
- The four core documents needed for a comprehensive Estate Plan

PORTFOLIO RISK MANAGEMENT 101: WHAT IS RISK ANYWAY?

- How to help ensure your investment allocation strategy is tailored to your risk tolerance level
- How long is the current bull market likely to last? Could we be in for a repeat of 2008?
- What are your options for financial planning? Which strategy makes the most sense for you and your family?
- How might future tax rate increases affect your retirement?

8 KEYS TO MAXIMIZING YOUR RETIREMENT

- Maximize tax efficiencies to keep more of your money working for you
- Secure basic life expenses with guaranteed income you can never outlive
- Invest to protect yourself in any economic condition
- Plan for the increases in health and medical costs likely to occur during your retirement
- Determine how to take money from your assets over time
- Coordinate Social Security benefits to match your retirement timetable
- Protect and plan appropriately for family and legacy objectives
- Get financially organized and create a plan of action!

CALL 602.343.9303

and let's talk about how we can help you make
an impact on your company and its employees
through our retirement and financial
planning workshops.

Interested in other retirement or financial topics?

JUST ASK US!



RETIREMENT WEALTH ADVISORS

strategyfinancialgroup.com

3200 E Camelback Rd., Ste. 285
Phoenix, AZ 85018

**MetLife (2015). 14th Annual U.S. Employee Benefit Trends Study: Opportunity is Knocking.*

All the information provided is based on current Social Security rules, benefits calculations, and payout promises of existing Social Security policy. You should consult with your local Social Security Office before acting upon any information provided by Strategy Financial Group. Strategy Financial Group is not affiliated or connected with, or endorsed by, the Social Security Administration. Strategy Financial Group does not provide specific legal or tax advice. Please consult with your tax advisor or legal professional for guidance with your individual situation. Investment advice is offered through Strategy Financial Services, LLC, a Registered Investment Adviser. Insurance and annuity products are offered separately through Strategy Financial Insurance, LLC.